Rotary
District 5320

Rotary Opens Opportunities

DISTRICT Training ASSEMBLY

March 18, 2021

Rotary
District 5320

The Club ***Secretary***

You are going to be part of your Rotary Club's Board

Rotary Opens Opportunities

CLUB SECRETARY

- YOU GET THE BEST JOB IN THE CLUB!!
- Why?
- You learn about your club! First hand!!
- You find out where the bodies are buried and who is who in your CLUB!

RESPONSIBILITIES

- Attend the district training assembly and the district conference
- Meet with the outgoing secretary and receive club records
- Meet with the incoming board of directors
- Create a My Rotary account on Rotary.org (if you don't already have one)
- Update your club's records and member list on My Rotary as changes occur
- Give the club treasurer the club invoices, due in January and July
- Serve on the club board and club administration committee
- Take minutes at club and board meetings and club assemblies
- Update club and officer information for the Official Directory and Rotary's records
- Manage club correspondence, responding to email and sending official notices and invitations
- Keep promotional items, name badges, and other materials used at meetings and events
- Take attendance and submit monthly attendance reports to the district governor
- Preserve your club's historical records
- Write an annual report at the end of the Rotary year
- Assist the club president, treasurer, and committees as needed
- Meet with your successor and hand over club records

RESPONSIBILITIES

Before you take office:

- Attend the district training assembly and the district conference
- Meet with the outgoing secretary and receive club records
- Meet with the incoming board of directors
- Create a My Rotary account on Rotary.org (if you don't already have one)

After you take office:

- Update your club's records and member list on My Rotary as changes occur
- Give the club treasurer the club invoices, due in January and July
- Serve on the club board and club administration committee
- Take minutes at club and board meetings and club assemblies
- Update club and officer information for the Official Directory and Rotary's records (DACDB)
- Manage club correspondence, responding to email and sending official notices and invitations
- Keep promotional items, name badges, and other materials used at meetings and events
- Take attendance and submit monthly attendance reports to the district governor
- Preserve your club's historical records
- Write an annual report at the end of the Rotary year
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RESOURCES: resources.rotary5320.org

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Rotary District 5320

admin@rotary5320.org (714) 921-1881

Resources.Rotary5320.org
a service of Rotary District 5320

Search here...

CLUB | DISTRICT | ROTARY FOUNDATION | ROTARY INTERNATIONAL | MEDIA AND VIDEO | CONTACT US

Club Resources
Files and training for club leaders and members

District Resources
Training for District leaders, administration and staff

Rotary Foundation
Projects and Programs of The Rotary Foundation

Photos & Media
Video programs about Rotary projects and causes.

Welcome to the *NEW* Rotary Resources website.

Rotary Resources is a service provided by Rotary District 5320, for Rotary clubs and members in Orange and Los Angeles County.

"In the clashes between ignorance and intelligence, ignorance is generally the aggressor."
PAUL HARRIS

Featured Content:
Run your club's Rotary Meeting online

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*RECENT CLUB PROJECTS
CLUB PLANNING
CLUB ADMINISTRATION
CLUB MARKETING
5320 PROJECT SHOWCASE
GRANTS
FUNDRAISING IDEAS
GUIDES & MANUALS
MEMBERSHIP
YOUTH SERVICE

RUNNING A WEBINAR OR ONLINE
ROTARY MEETING
INSURANCE
RAFFLES
TAX INFORMATION FOR CLUBS

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  - Fund
  - Guid
  - Mem
  - Satel
  - Video Downloads

Rotary Resources > Club Planning > Club Administration

Club Administration

ministration involves organizing people and resources to achieve common goals. Clubs must vide service to the community, attract and retain members, and develop leaders for the club, national.

ministrative responsibilities include:

ng weekly meetings and programs
among club members
ormed through a club newsletter or Web site
- Collecting dues
- Maintaining club membership lists and reporting to Rotary International
- Tracking club attendance

The Standard Rotary Club Constitution outlines administrative requirements that every club must satisfy. The Recommended Rotary Club Bylaws, which can be tailored to suit each club's needs, also includes administrative procedures. The Club Planning page has more resources.

Opportunities

RESOURCES: resources.rotary5320.org

- Go to District 5320.org website to find this directly
- On the Rotary 5320 website on right side is the resources.rotary5320.org OR direct in your search bar: resources.rotary5320.org
- Once the page is in view, Click on the first tab on first row: Club
- Then click on: Club Administration
- Read – Your Club Secretary 2016-2019 Edition Manual (tons of colorful information)

Rotary International (RI): My Rotary

- Learning Center
- Brand Center
- Club Central
- Add and Terminate a Member or Find a Previous Member
- Create your Club Insurance and Endorsements – July 1, 2020

Rotary International (RI) - Obligations

1) Receive and Pay Club invoices twice a year – July and January (sent to the President, Secretary & Treasurer)
2) Dues calculated based on reported membership with RI
3) Critical Dates: December 31 and June 30
4) Club Treasurer should pay RI direct

Support – HELP!! What do I do now?

1. Ask past Club Secretary or maybe the President
2. Ask your Assistant Governor (AG)
3. Rotary International (RI) has support – Representative at Rotary Support Center (by phone or email)
4. Call District Administrator: Kevin Islas at (714) 921-1881
5. DacDB help call Kevin (above) or Garry Heath at (949) 290-1295

Rotary Club Central (RCC)

1) Track Club Goals
2) Membership
3) Volunteer Hours
4) President’s Citation (23 goals)
5) RCC is as simple as 1, 2, 3

Rotary Club Central (RCC): RCC 123

- Go to Rotary website RI.org
- Sign in to your ‘My Rotary’
- Click for members
- Click for RCC
- Sign in again
- And YOU are IN
- Explore and PLAY with this page – Have FUN!!!
- (Don’t let any of this intimidate you)

Rotary District 5320

Your Club Secretary Duties

- Read you Club Bylaws, Constitution and/or Operating Manual
- Why?
- It gives you important information on your club's specific Secretary duties
- Responsible for Club records
- Maybe ADDING and/or TERMINATING MEMBERS
- Tracking attendance
- Reports (what kind and why?)

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REPORTS

- Statistics and Useful Data:
- Create a Club Directory
- Anniversaries & Birthdays Date for Fines
- Is the RI data match what is in DaCdb
- FIND other people in the District
- Attendance reports (DATA that encourages retention)
- Officers and Positions with Job Descriptions

If you club is a 501c3 or 4 Corporation

- Annual Officer Reports – CA Secretary of State SI-100:
  At least every 2 years or when officers change (every year). https://www.sos.ca.gov/ (There is a FEE every 2 years!)
- FTB Franchise Tax Board https://www.ftb.ca.gov/file/business/types/charities-nonprofits/index.html
- Department of Justice – https://oag.ca.gov/charities
- California Charities Raffle Registry - https://oag.ca.gov/charities/raffles
- Raffles Report due October 1 yearly
- City Business License (apply annually or depending on cities rules)
- Signatories for Bank Accounts (usually 2 -3 on a check)
- IRS Exemption Status – 501c3/4 https://www.irs.gov/charities-and-nonprof

OLD FASHION SCRETARY DUTIES

✓ For Club and Board Meetings:

1. Create Agenda (some Presidents do this themselves)
2. Take Minutes, prepare a Draft for President to Review, then
3. Circulate Minutes Among the Board Members for Corrections. Secure approval at the next Board Meeting.
4. Collecting and Distributing Postal Mail?
5. Liaison with Meeting Venue?
6. Coordinating SAAs (Sargents at Arms) to do the work?

Rotary District 5320

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ATTENDANCE (in person)

- Weekly: Create a sign-in sheet
- Record Attendance
- Enter Make-ups (Events, Fundraiser(s), Board Meetings, Committee
- Meetings, etc.)
- Match Make-ups
- Send PMAIL to ALL Members Who Have MISSED a MEETING

MEMBER DATA DaCdb (District & Club Data Base)

- ADD New Members: Enter at RI/DaCdb (membership may do this)
- Log-in info for ‘My Rotary’ and DaCdb
- Terminate Members and Look-up Old Members
- Correct Status: Leave of Absence (LOA), Rule of 85, Friends of Rotary
- Reports: Access Attendance Data, Sergeant at Arms, Fining data
- Club Data & Club Statistics (Gender, Age?, Members Increased or Lost)
- Print a Club Directory
- Integrate with Rotary International (RI)
- PMAIL

PMAIL (DaCdb's form of EMAIL)

Rotary District 5320

- ✓ Use DaCdb to:

A. Send Correspondence to your Members

B. Check-in with Members WHO have been ABSENT

C. Send Documents to Members (flyer from your club or another for events/fundraisers or bylaws & constitution)

- ✓ ETIQUETTE:

A. Use for Club Business ONLY

B. Use Master Brand primarily with Mark of Excellence secondarily

C. Use the Brand Center at 'My Rotary' to download needed graphics

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Rotary
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MY ROTARY my.rotary.org

DaCdb dacdb.com

District 5320 Resources
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Have FUN!!!

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QUESTIONS???

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